

(1) Second Account and Report of Successor Conservator and (2) Petition for Conservator's Fees and Attorney's Fees and for (3) Order Reducing Weekly Allowance to Conservatee

Age: 62		CLAUDIA SPAULDING , Conservator, is Petitioner. Account period: 1-1-10 through 12-31-11 Accounting: \$ 109,947.81 Beginning POH: \$ 98,006.83 Ending POH: \$ 36,533.62 Conservator: \$ 10,007.50 (656.50 hours @ \$10.00-\$25.00/hr, itemized) Attorney: \$ 1,400.00 (Less than local rule) Attorney: \$ 300.00 (will preparation) Petitioner states the Conservator herein is also the Trustee of the Elizabeth Catherine Angell Trust (Page 2). The Conservatorship Estate owns a one-half interest in the residence where the Conservatee resides, and the other half owned by the Trust. The Conservatee is the sole current beneficiary of the Trust and the remainder beneficiaries are entitled to distributions only after the Conservatee's death. Petitioner states that although Conservatorship Estate assets have been reduced, the trust has sufficient assets to provide for the Conservatee and if additional funds are needed, funds will be distributed from the Trust to the Conservatorship Estate, including payment for any attorney's and Conservator's fees approved by the Court. Petitioner requests to reduce the Conservatee's allowance and states that the Conservatee has used the \$300.00/week previously approved for food, clothing, and auto and household expenses for unnecessary items; therefore, the Conservator requests a reduction in the weekly allowance to \$200.00/week, which the Conservator believes is adequate. Petitioner prays for an Order: 1. Settling and allowing the Second Account; 2. Authorizing the Conservator and Attorney fees and commissions; 3. Reducing the Conservatee's weekly allowance to \$200.00/week; and 4. For such other and further relief as the Court may deem proper.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> Page 2 of this calendar, the Elizabeth Catherine Angell Trust, is a related matter.
DOB: 3-28-50			
	Aff.Sub.Wit.		
✓	Verified		
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	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	2620(c)		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

Thirteenth Account and Report of Trustee, Petition for Settlement Thereof and for Allowance of Trustee's Fees and Attorney's Fees

CLAUDIA SPAULDING , Trustee, is Petitioner.			NEEDS/PROBLEMS/COMMENTS:
Account period: 1-1-10 through 12-31-11			
Accounting: \$ 375,325.00			
Beginning POH: \$ 358,542.55			
Ending POH: \$ 359,097.28			
Trustee: \$ 2,505.00			
(83.5 hours @ \$30.00/hr, itemized. Services include bookkeeping, writing checks, trips to bank, record management for accounting and taxes, communications, assembling data and records for this account, meeting with contractors regarding repairs to the residence, etc.)			
Attorney: \$ 750.00 (3 hours @ \$250.00/hr)			
Petitioner prays for an Order:			
1. Settling and allowing the 13 th Account and confirming and approving the acts of Petitioner as Trustee;			
2. Authorizing the trustee and attorney fees and commissions; and			
3. For such other and further relive as the Court may deem proper.			
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			Reviewed by: skc
			Reviewed on: 4-6-12
			Updates:
			Recommendation:
			File 2 - Angell

Notice of Motion and Motion for Summary Judgment or in the Alternative for Summary Adjudication, Originally filed Dec. 01, 2010

3

Age: 89 years DOB: 10/6/1922		CRAIG MCGLASHAN , Conservator, is petitioner.	NEEDS/PROBLEMS/COMMENTS:	
		Account period: 5/24/10 – 5/30/11	OFF CALENDAR. Amended Account filed and set for hearing on 5/23/12.	
		Accounting - \$1,773,164.49 Beginning POH- \$ 872,934.64 Ending POH - \$1,691,981.80		
Cont. from 020112, 031212		Current bond is \$1,099,584.00	Need Amended Account. In addition to the issues listed below a Supplemental Inventory and Appraisal was filed on 4/2/12 and it appears the account no longer balances.	
Aff.Sub.Wit.		Conservator - waives		
✓ Verified		Attorney - \$800.00	<ol style="list-style-type: none"> Summary of Account is not on the mandatory Judicial Council form. Probate Code 2620(a). Need Board and Care Statements. Probate Code §2620(c)(5). Need bank statements. Probate Code §2620(c)(2) Morgan Stanley Smith Barney Account was not appraised by the Probate Referee as required. Probate Code §2610(c) and Probate Code §8901. Inventory and appraisals filed total \$1,084,929.64. Beginning property on hand totals \$872,934.64. Beginning property on hand should be the inventory and appraisal amount. Petitioner sold real property of the conservatorship (court confirmed) during this account period. Need original closing escrow statements. Probate Code §2620(c)(4). 	
Inventory		Petitioner states the current bond is less than the value of the estate. Petitioner states he is a member of the State Bar and is the only child of the conservatee and request that the court leave the bond set at the current amount.		
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Not.Cred.				
✓ Notice of Hrg				
✓ Aff.Mail	W/			
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Duties/Supp				
Objections				
Video Receipt				
CI Report				
2620(c)	X	Petitioner prays for an Order: <ol style="list-style-type: none"> That Petitioner be directed to pay the sum of \$800.00 to the Law Office of Howk and Downing. The court order that the Conservatee is not able to complete an affidavit of voter registration; All acts and transactions of the Conservator of the Person and Estate of Jamie E. McGlashan, as set forth in the account and report or relating to matters set forth in the account and report be ratified, confirmed and approved. 		
Order	X			
Aff. Posting				
Status Rpt				
UCCJEA				
Citation				
FTB Notice				
			<i>Please see additional page</i>	
			Reviewed by: KT	
			Reviewed on: 4/6/12	
			Updates:	
			Recommendation:	
			File 4 - McGlashan	

- 7. Schedule B- Gain on Sale lists the gain on the sale of the real property as \$164.38. The gain is the difference between the inventory and appraisal value (\$220,000) and the sale price (\$240,000). Therefore the gain on sale is \$20,000.00.**
- 8. Disbursement schedule includes a disbursement to Howk & Downing in the amount of \$2,743.04 for costs and filing fee associated with conservatorship. Need itemization of costs and filing fee.**
- 9. Disbursement schedule includes a disbursement to Craig McGlashan for pre-conservatorship expenses in the amount of \$947.50. Need itemization.**
- 10. Disbursement schedule includes a returned item chargeback fee to Bank of America in the amount of \$36.00. Court may require clarification.**
- 11. 1999 Jaguar is valued at \$8,500.00 on the inventory and appraisal. The property on hand at the end of the account period lists the Jaguar valued at \$8,510.00.**
- 12. If court requires bond to be increased pursuant to Probate Code §2320, bond should be increased to \$1,907.217.24.**
- 13. Need Order**

(1) First Account and Report of Guardian and (2) Petition for Order Approving,
Allowing and Settling Account and Report of Guardian

Age: 17 years DOB: 9/24/1994		JENNIFER LOEFFLER , guardian, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 8/3/10 – 2/29/12	1. Proof of service of the <i>Notice of Hearing</i> on Anthony Ellsworth (minor) was mailed on 4/9/12, 7 days prior to the hearing and not the required 15 days.
Cont. from		Accounting - \$225,734.60	
	Aff.Sub.Wit.	Beginning POH - \$224,998.80	
✓	Verified	Ending POH - \$225,734.60	
	Inventory	(all funds are in a blocked account)	
	PTC		
	Not.Cred.	Guardian - waives	
✓	Notice of Hrg	Attorney - not	
✓	Aff.Mail	addressed	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.	Petitioner prays for an order approving, allowing and settling the first account and report of guardian.	
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	2620(c)		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: KT
			Reviewed on: 4/6/12
			Updates: 4/11/12
			Recommendation:
			File 5 - Ellsworth

(1) First and Final Account and Report of Successor Administrator and (2) Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and (3) for Distribution [Prob. C. 216; 9202; 10800; 10810; 10951; 11600; 11850(a)]

DOD: 1/1/1996		PUBLIC ADMINISTRATOR,	NEEDS/PROBLEMS/COMMENTS:
		Administrator, is Petitioner.	
		Account period: 9/13/10 – 10/31/11	
Cont. from 020812, 031912		Accounting - \$50,000.00	Continued from 3/19/12. Minute order states Counsel informs the court that she needs to file an amended accounting. As of 4/6/12 an amended accounting has not been filed.
	Aff.Sub.Wit.	Beginning POH - \$50,000.00	
✓	Verified	Ending POH - \$24,070.86	
✓	Inventory	Administrator - \$1,600.00 (statutory)	1. Petitioner filed a Petition for Court Authorization to Sell Real Property on 3/11/11 using a fee waiver because at the time the estate had no cash. The Petition was heard on 4/28/11 and granted. It appears that now that the property has been sold that the filing of \$395.00 should be paid as a cost of administration.
✓	PTC	Administrator X/O - \$1,248.00 (for sale of real property and preparation of tax returns)	
✓	Not.Cred.		
✓	Notice of Hrg	Attorney - \$1,600.00 (statutory)	
✓	Aff.Mail		
	Aff.Pub.	Bond fee - \$125.00 (o.k.)	
	Sp.Ntc.		
	Pers.Serv.	Court fee - \$25.50 (certified copies)	
	Conf. Screen		
✓	Letters	Closing - \$500.00	
	Duties/Supp		
	Objections	Distribution, pursuant to intestate succession, is to:	
	Video Receipt	Larry Ford, Carmen Gant, Yvonne Ford, Shirley Shackelford, Diane Levi, Leo Ford, Tony Ford, Alfred Ford and Garfield Gilbert - \$1,688.85 each.	
	CI Report		
✓	9202	Amanda Ford and Robert Ford, III - \$844.43 each and	Reviewed by: KT
✓	Order	Louis Ireland, Lamont Ireland and Kelly Ireland - \$562.95 each.	Reviewed on: 3/6/12
	Aff. Posting		Updates:
	Status Rpt		Recommendation:
	UCCJEA		File 6 - Ford
	Citation		
✓	FTB Notice		

Probate Status Hearing Re: Filing of Final Accounting

DOD: 2/29/12		<p>AMY IHDE, daughter, was appointed conservator of the person and estate on 1/27/11 with bond set at \$19,000.00</p> <p>On 2/29/12 the conservatee died.</p> <p>This status hearing was set for the filing of the final account.</p> <p>Status Report filed on 4/12/12 states the conservatorship estate owns a mobile home located in a mobile home park. After the conservatee's death there were no funds to pay the rent on the space at the mobile home park. Conservator attempted to sell the mobile home without success. On 3/13/12 the attorney filed an ex parte application to sell the mobile home to the mobile home park. The petitioner was granted. In March/April the real estate agent determined that a third party would purchase the mobile home at \$30,000. An escrow has been opened. If the sale is not consummated then the Conservatee will sell the mobile home to the mobile home park for \$8,000.00 as approved by the court in its prior order.</p> <p>Given the above circumstances, Petitioner requests an additional 60 days to file the First and Final Account.</p>	NEEDS/PROBLEMS/COMMENTS:
Cont. from			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
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Citation			
FTB Notice			
		Reviewed by: KT	
		Reviewed on: 4/6/12	
		Updates:	
		Recommendation:	
		File 7 - Lewis	

(1) First and Final Report of Executor on Waiver of Account and (2) Petition for Settlement Thereof, for (3) Waiver of Executor's Compensation for Ordinary Services, for Allowance of Attorney's Fees for Ordinary Services and for (4) Final Distribution (Prob. C. 10800, 10810, 10954, 12200)

DOD: 6-13-10		PATRICIA SEDANO , Executor with Full IAEA without bond, is Petitioner. Accounting is waived. I&A: \$165,000.00 POH: \$165,000.00 (real property only) Executor (Statutory): Waived Attorney (Statutory): \$5,950.00 Distribution pursuant to Decedent's will is to: Patricia Sedano – Entire estate consisting of real property valued at \$165,000.00.	NEEDS/PROBLEMS/COMMENTS:	
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
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✓	Letters			3-1-11
	Duties/Supp			
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	Status Rpt			
	UCCJEA			
	Citation			
✓	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4-12-12	
			Updates:	
			Recommendation: SUBMITTED	
			File 8 - Sedano	

Petition for Attorney's Fees for Court Appointed Counsel for Conservatee and Request for Termination of Appointment and Discharge as Court Appointed Counsel (Prob. C. 1470(b))

DOD: 03/07/12		<p>JANET WRIGHT, Petitioner, was Court appointed to represent the Conservatee on 11/28/11.</p> <p>PUBLIC GUARDIAN, was appointed Temporary Conservator of the Person and Estate on 11/17/11. The Temporary Conservatorship was extended three times to 03/08/12. Conservatee died on 03/07/12, therefore a permanent conservatorship was not established.</p> <p>Petitioner requests fees in connection with the representation of the Conservatee for the Public Guardian's petition to appoint a conservator.</p> <p>Petitioner asks that she be paid from the conservatorship estate for 12.35 attorney hours @ \$250.00/hr. and 3.4 paralegal hours @ \$110.00/hr. for a total of \$3,474.00.</p> <p>Services are itemized by date and include review of documents, visits with client, and court appearances.</p> <p>Petitioner requests that, since the conservatee is now deceased, that her appointment as Counsel for the conservatee be terminated</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>				
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<table border="1"> <tr> <td>Reviewed by: JF</td> </tr> <tr> <td>Reviewed on: 04/06/12</td> </tr> <tr> <td>Updates:</td> </tr> <tr> <td>Recommendation:</td> </tr> <tr> <td>File 9 - Pasillas</td> </tr> </table>			Reviewed by: JF	Reviewed on: 04/06/12	Updates:	Recommendation:	File 9 - Pasillas
Reviewed by: JF							
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Updates:							
Recommendation:							
File 9 - Pasillas							

**Petition for Probate of Will and for Letters of Administration with Will Annexed;
 Authorization to Administer Under IAEA (Prob. C. 8002, 10450)**

DOD: 03/29/09			<p>DALE L. MELL, grandson, is Petitioner and requests appointment as Administrator with Will Annexed, with bond set at \$158,600.00.</p> <p>In the alternative, the Petitioner requests appoint of the Public Guardian as Administrator with Will Annexed without bond.</p> <p>Full IAEA – ok</p> <p>Will dated 02/07/02</p> <p>Residence: Fresno Publication: The Business Journal</p> <p>Estimated Value of the Estate: Personal property - Unknown Real property - \$158,600.00 Total - \$158,600.00</p> <p>Probate Referee: RICK SMITH</p> <p>Declaration of Dale L. Mell Re: Attempts to Obtain Decedent's Original Will filed 04/11/12 states that Petitioner believes decedent's son, Dale G. Mell is in possession of decedent's original will. Petitioner states that he has tried on numerous occasions to obtain the original will from Dale G. Mell since decedent's death, but has not been able to do so. At one point, Dale G. Mell stated to Petitioner that he would provide the original will to the Petitioner, but has failed to do so.</p> <p>Objections to: 1) Probate of Will; and 2) Appointment of Dale L. Mell as Administrator with Will Annexed filed by Dale G. Mell on 04/12/12 states: Objector is decedent's son and the named Executor in the purported will of decedent filed by the Petitioner and states that the Petition of Dale L. Mell should be denied because a) Petitioner has not submitted nor are there any allegations that an original will of decedent presently exists, b) Pursuant to Probate Code § 6124, there is a presumption that the testator destroyed the will with the intent to revoke it. This presumption affects the burden of producing evidence. Further, Petitioner should not be appointed as Administrator with Will Annexed because, as the named Executor and son of decedent, Objector has a superior right to appointment as Administrator of the estate.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. The original Will does not appear to have been deposited with the Court. Need original Will.</p> <p>Note: Competing Petition of Dale G. Mell filed 04/12/12 and set for hearing on 05/15/12.</p>
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Reviewed by: JF

Reviewed on: 04/06/12

Updates: 04/12/12

Recommendation:

File 10 - Mell

Petition for Letters of Administration; Authorization to Administer Under IAEA
(Prob. C. 8002, 10450)

DOD: 08/14/11		DAVID MICHAEL VALLA , son, is Petitioner and requests appointment as Administrator without bond. Full IAEA – ok All heirs waive bond. Decedent died intestate. Residence: Fresno Publication: The Business Journal <u>Estimated Value of the Estate:</u> Real property - \$190,000.00 Probate Referee: RICK SMITH	NEEDS/PROBLEMS/COMMENTS:	
Cont. from				
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	Citation			
	FTB Notice			
			Reviewed by: JF Reviewed on: 04/06/12 Updates: Recommendation: SUBMITTED File 11 - Valla	

Age: 83
DOB: 02/23/28

TEMPORARY EXPIRES 04/16/12**NEEDS/PROBLEMS/COMMENTS:**

Cont. from 112811,
020612

Aff.Sub.Wit.

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Letters

Duties/Supp

Objections

Video
Receipt

CI Report

9202

Order

Aff. Posting

Status Rpt

UCCJEA

Citation

FTB Notice

LEROY R. PERSONS, was appointed as Conservator of the Person & Estate of Leroy Alvin Persons and Letters were issued on 11/29/10.

Minute Order from Status Hearing on 09/26/11 set this matter for status and states: The Court accepts the voluntary resignation of Leroy Parsons and relieves him as conservator of the person and estate. The Court appoints the Public Guardian as temporary successor conservator of the person and estate.

Status Report filed 02/01/12 states that the Public Guardian is still working on obtaining Medi-Cal benefits for the Conservatee and is currently addressing specific issues that Medi-Cal has identified. The Public Guardian requests a continuance of at least 60 days in order to allow time to respond to Medi-Cal.

Ex Parte Petition for Instruction and Authorization to Abandon Real Property filed 02/07/12 by the Public Guardian was granted on 02/07/12.

Status Report Re: Abandoned Property and Securing of Medi-Cal Benefits by Public Guardian filed 04/06/12 states: The Court authorized the abandonment of conservatees real property on 02/07/12 and the conservatee is now on Medi-Cal. Currently, the Public Guardian is working on getting the requirements for admission into a skilled nursing facility. In order to allow time to obtain the needed information and find suitable placement, the Public Guardian requests that the next status hearing be set no earlier than 60 days from the date of the hearing.

CONTINUED FROM 02/06/12

Reviewed by: JF

Reviewed on: 04/06/12

Updates: 04/09/12

Recommendation:

File 12 - Persons

Status Re: Settlement

		<p>DOUGLAS POSTON, WILLIAM K POSTON, JR., and KRISTIN CALDERON, beneficiaries of the William K. Poston and Wilma B. Poston Living Trust dated 9-3-99, filed a Petition for Order Compelling Trustee to Account and Report, for Surcharge, and for Removal.</p> <p>LYNDA EVANS is Respondent.</p> <p>On 10-4-11, the Court appointed William K. Poston, Jr., as successor trustee and set the matter for settlement conference and trial.</p> <p>At the trial date on 2-14-12, Attorney Erlach advised the Court that the parties have been attempting to settle amongst themselves and have been ignoring both counsel. The Court took the trial off calendar and set this status hearing regarding settlement.</p> <p>Leigh W. Burnside (of Dowling Aaron Inc., counsel for Petitioners) filed a declaration on 4-11-11 stating:</p> <p>At hearing on 10-4-11, the Court appointed Mr. Poston as successor trustee and it is Ms. Burnside's understanding that the Court directed Ms. Evans to turn over certain financial information to Mr. Poston.</p> <p>Upon the filing of the Petition, attorneys Mara Erlach and Gary Motsenbocker engaged in discussions, and in an effort to keep legal fees down, the parties also communicated with each other without the assistance of counsel. Attorney Burnside's understanding is that Ms. Evans shared some financial information with Mr. Poston, but failed to turn over all information and documents.</p> <p>Mr. Poston also experienced difficulty obtaining trust-related records from Union Bank. Accordingly, on his behalf, a subpoena duces tecum was served on Union Bank on approx. 3-14-12. Union Bank has not requested extension of time, so unless it does, records are expected to be produced on or about 4-15-12.</p> <p>Once Mr. Poston receives the records, he will be in a position to set trial date on the remaining surcharge claim against Ms. Evans. It is attorney Burnside's understanding that Ms. Evans is still represented by attorney Motsenbocker. Attorney Burnside will endeavor to speak with attorney Motsenbocker prior to the status hearing, but meaningful settlement discussions will not be possible until records are received from Union Bank and reviewed.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Aff.Sub.Wit.			
Verified			
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		<p>Reviewed by: skc</p> <p>Reviewed on: 4-6-12</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 13 - Poston</p>	

Petition for Termination of Guardianship

Age: 13		WANDA K. WOMACK and JESSE W. WOMACK, Guardians, are Petitioners.	NEEDS/PROBLEMS/COMMENTS:	
DOB: 6-8-98				
		<p>Petitioners are the Paternal Grandmother and Step-Grandfather of the minor and were appointed Guardians on 4-3-06.</p> <p>Father: JEREMY V. DEEN - <i>Served by mail on 2-18-12</i></p> <p>Mother: REBECCA WEGLEY - <i>Signed Consent and Waiver of Notice 8-15-11</i></p> <p>Paternal Grandfather: Anthony Deen (<i>Deceased</i>) Maternal Grandfather: Robert Wegley - <i>Signed Consent and Waiver of Notice 8-15-11</i></p> <p>Maternal Grandmother: Vanessa McGinnis - <i>Signed Consent and Waiver of Notice 8-15-11</i></p> <p>Siblings: Dalles Childers, Jessica M. Deen</p> <p>Petitioners state that Anthony has decided he would like to move and live in Louisiana with his grandparents Mike and Vanessa McGinnis. He visits with them every year, and would now like to live with them. Guardians agree and want what is best for Anthony and his happiness.</p> <p><i>Vanessa McGinnis, Maternal Grandmother, signed a Consent and Waiver of Notice.</i></p> <p>Court Investigator Jennifer Young filed a report on 4-10-12.</p>	<p>1. Need consent and waiver of notice or proof of service of Notice of Hearing pursuant to Probate Code §1460(b)(5) on Minor Anthony V. Deen (age 13).</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 4-6-12	
			Updates: 4-11-12	
			Recommendation:	
			File 14 - Deen	

(1) Waiver of Accounting and (2) Petition for Final Distribution

DOD: 6-28-10		CINDY L. WALL , Executor with Full IAEA without bond, is Petitioner. Accounting is waived. I&A: \$174,360.50 POH: \$174,360.50 (\$4,360.50 cash plus real property) Executor: Waived	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner does not address whether notice was given to the Director of Health Care Services pursuant to Probate Code §9202(a). If notice was required, but not given, the matter may require continuance for the appropriate time for response. 2. Need Order. 9202(a). Not later than 90 days after the date letters are first issued to a general personal representative, the general personal representative or estate attorney shall give the Director of Health Care Services notice of the decedent's death in the manner provided in Section 215 <u>if the general personal representative knows or has reason to believe that the decedent received health care under Chapter 7 (commencing with Section 14000) or Chapter 8 (commencing with Section 14200) of Part 3 of Division 9 of the Welfare and Institutions Code, or was the surviving spouse of a person who received that health care.</u> The director has four months after notice is given in which to file a claim.
	Aff.Sub.Wit.		
✓	Verified		
✓	Inventory		
✓	PTC		
✓	Not.Cred.		
N/A	Notice of Hrg	Distribution pursuant to Decedent's will: Cindy L. Wall: Entire estate (\$4,360.50 cash plus real property)	9202(a). Not later than 90 days after the date letters are first issued to a general personal representative, the general personal representative or estate attorney shall give the Director of Health Care Services notice of the decedent's death in the manner provided in Section 215 <u>if the general personal representative knows or has reason to believe that the decedent received health care under Chapter 7 (commencing with Section 14000) or Chapter 8 (commencing with Section 14200) of Part 3 of Division 9 of the Welfare and Institutions Code, or was the surviving spouse of a person who received that health care.</u> The director has four months after notice is given in which to file a claim.
N/A	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: skc
			Reviewed on: 4-6-12
			Updates:
			Recommendation:
			File 15 - Wedel

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 12 years DOB: 7/11/1999		<p align="center">THERE IS NO TEMPORARY. Temporary was denied.</p> <p>LINDA HICKSON, maternal grandmother, is petitioner.</p> <p>Father: JOHN MCCORVEY</p> <p>Mother: LATONDA COMPAGNO – <i>personally served on 1/13/12.</i></p> <p>Paternal grandfather: Not listed Paternal grandmother: Not listed Maternal grandfather: Curtis Harper</p> <p>Petitioner states mom has started using drugs and stealing. Mom is in a domestic violence relationship and Petitioner fears for the safety of the minor.</p> <p>Objections of mother, Latonda Harper-Compagno filed on 1/19/12 states Linda Hickson will not provide a safe, stable environment for the minor. Ms. Harper-Compagno states she was removed from her for child abuse in Monterey County. Ms. Harper-Compagno states Ms. Hickson is in the process of losing physical custody of her physically challenged daughter.</p> <p>Court Investigator Jennifer Young's Report filed on 3/5/12</p> <p>DSS Social Worker Anita Ruiz's Report filed on 3/5/12</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Continued from 3/12/12. Minute order states the Court orders Latonda Compagno to submit to a hair follicle test today through Global. Additionally, the Court orders that a court investigator conduct a further interview of Linda Hickson and Latonda Compagno as well as look into the status of the Voluntary Family Maintenance Services and Latonda Compagno's test results.</p> <ol style="list-style-type: none"> 1. Need proof of personal service of the <i>Notice of Hearing</i> along with a copy of the <i>Petition</i> or <i>Consent and Waiver of Notice</i> or Declaration of Due Diligence on: <ol style="list-style-type: none"> a. John McCorvey (father) – <i>proof of service by mail filed on 1/17/12. Probate Code §1511 requires personal service on the father.</i> 2. Proof of personal service of the <i>Notice of Hearing</i> on Destyni McCorvey (minor) and proof of service by mail on John McCorvey (father) and Curtis Harper (paternal grandfather) do not include the name and address of the person serving the documents and it does not indicate that the <i>Notice of Hearing</i> was served with a copy of the petition as required. 3. Need proof of service of the Notice of Hearing along with a copy of the petition or consent and waiver of notice or declaration of due diligence on: <ol style="list-style-type: none"> a. Paternal grandparents 	
Cont. from 031212				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input checked="" type="checkbox"/>	Notice of Hrg			
<input checked="" type="checkbox"/>	Aff.Mail			W/O
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input checked="" type="checkbox"/>	Pers.Serv.			W/O
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	CI Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			

Reviewed by: KT
Reviewed on: 3/1/12
Updates:
Recommendation:
File 16 – McCorvey

Declaration of Latonda Compagno dated 3/29/12 states Linda Hickson continues to go against the court order and has been speaking to Destyni about the court case. Ms. Compango states she has changed her ways and her life.

- Virgil is no longer in the home.
- She doesn't do criminal activities.
- She does not do drugs.
- She is active in Destyni's school.
- She is in outpatient intensive care.
- She is in compliance with VFM and CPS.

Court Investigator Jennifer Young to provide supplemental investigation report.

Petition for Probate of Will and for Letters Testamentary

DOD: 10-23-11		ANNA F. WILLIAMS , Daughter and named Executor without bond, is Petitioner. Full IAEA – ok Will dated 4-8-03 Residence: Fresno Publication: Fresno Bee Estimated value of estate: Real property - \$240,000.00 Probate Referee: Steven Diebert	NEEDS/PROBLEMS/COMMENTS: <u>Continued from 3-26-12</u> All defects have been cured.
Cont. from 032612			
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		Reviewed by: skc	
		Reviewed on: 3-16-12	
		Updates:	
		Recommendation:	
		File 17 - Turner	

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 3 months		TEMPORARY EXPIRES 4-16-12 SANTOS ROBERT DUQUE and TARA LYNN DUQUE , Maternal Second Cousins, are Petitioners. (Santos is cousin to Grace Martinez, the minor's mother.) Father: UNKNOWN - Declaration of Due Diligence filed 2-14-12 Mother: GRACE MARTINEZ - Consent and Waiver of Notice filed 2-14-12 Paternal Grandfather: Unknown Paternal Grandmother: Unknown Maternal Grandfather: Armando Martinez - Deceased Maternal grandmother: Mary Chacon - Served by mail 3-26-12 Petitioners state Valentina needs a loving family that can care for her. Her mother is unstable and mentally unable to care for her, and her father is unknown. If Petitioners had not intervened, Valentina would have been placed in CPS as her mother had three other children taken at birth. Court Investigator Charlotte Bien filed a report on 3-27-12.	NEEDS/PROBLEMS/COMMENTS: 1. Petitioners state the mother does not know who the father is. If notice is not excused, need proof of service of Notice of Hearing with a copy of the Petition on Father and Paternal Grandparents pursuant to Probate Code §1511. 2. Notice of Hearing was served on Maternal Grandmother Mary Chacon without a copy of the Petition pursuant to Probate Code §1511. The Court may require amended service.	
DOB: 1-11-12				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
N/A	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			

Reviewed by: skc
Reviewed on: 4-6-12
Updates:
Recommendation:
File 18 - Martinez

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 13 years
DOB: 6/15/1998

THERE IS NO TEMPORARY.
No temporary was requested.

NEEDS/PROBLEMS/COMMENTS:

ANNIE JANET BOONMY, sister, is petitioner.

Father: **VENTHY CHAN**

Mother: **SOPHIN DAMLONG** –
nominates.

Paternal grandparents: not listed
Maternal grandfather: Ken Damlong –
consents and waives notice.

Maternal grandmother: Prom
Damlong – *consents and waives
notice.*

Petitioner states the child needs a
guardian due to the fact that neither
parent can provide a stable home,
medical, dental, etc.

**Court Investigator Jennifer Daniel's
Report filed on 4/6/12.**

1. Need *Notice of Hearing*.
2. Need proof of personal service of the *Notice of Hearing* along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on:
 - a. Austin Chan (minor, age 13)
 - b. Venthy Chan (father)
 - c. Sophin Damlong (mother) Note:
mother has nominated the petitioner but has not signed a waiver of notice.
3. Need proof of service of the *Notice of Hearing* along with a copy of the Petition or Consent and Waiver of Notice or Declaration of Due Diligence on:
 - a. Paternal grandparents
4. Petition does not list the names and addresses of the paternal grandparents.

Cont. from		
	Aff.Sub.Wit.	
✓	Verified	
	Inventory	
	PTC	
	Not.Cred.	
	Notice of Hrg	X
	Aff.Mail	X
	Aff.Pub.	
	Sp.Ntc.	
	Pers.Serv.	X
✓	Conf. Screen	
✓	Letters	
✓	Duties/Supp	
	Objections	
	Video Receipt	
✓	CI Report	
	9202	
✓	Order	
	Aff. Posting	
	Status Rpt	
✓	UCCJEA	
	Citation	
	FTB Notice	

Reviewed by: KT

Reviewed on: 4/6/12

Updates: 4/12/12

Recommendation:

File 19 - Chan

20 Cesar Gomez, Dassy Madrigal, Ashley Zaragoza and Jorge Zaragoza
(GUARD/P) Case No. 12CEPR00155

Atty Zaragoza Gomez, Maria De Jesus (pro per Petitioner/maternal aunt)
 Atty Vasquez, Jorge Luis Lopez (pro per Objector/Jorge's father)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Cesar age: 16 years DOB: 10/17/1995		<p>THERE IS NO TEMPORARY. No temporary was requested.</p> <p>MARIA DE JESUS ZARAGOZA GOMEZ, maternal aunt, is petitioner.</p> <p>Father (Cesar and Ashley): UNKNOWN – <i>Declaration of Due Diligence.</i></p> <p>Father (Dassy): OMAR MADRIGAL – <i>Consents and waives notice.</i></p> <p>Father (Jorge): JORGE LUIS LOPEZ VASQUEZ</p> <p>Mother: JUANA ZARAGOZA – <i>Deceased.</i></p> <p>Paternal grandparents (Cesar and Ashley): Unknown</p> <p>Paternal grandfather (Dassy): Maximo Mendoza – <i>consents and waives notice.</i></p> <p>Paternal grandmother (Dassy): Catalina Barajas</p> <p>Paternal grandparents (Jorge): Unknown</p> <p>Maternal grandfather: Ricardo Zaragoza – <i>consents and waives notice.</i></p> <p>Maternal grandmother: Maria G. Gomez – <i>consents and waives notice.</i></p> <p>Petitioner states the mother is deceased. Petitioner states she needs the guardianship so that she can enroll the children in school and take them to the doctor. The children and their mother lived with Petitioner and she has always helped with their day to day needs.</p> <p>Objections of JORGE LUIS LOPEZ VASQUEZ, father of Jorge, filed on 3/28/12 states he was not notified that he was the father and was kept from being a part of his son's life. After the mother died he has started to visit with the minor. Father states he is requesting that the guardianship of his son be denied and that the minor be returned to his care. In the alternative he requests that he be able to have his son in his care on a one-week alternating basis. However there is no reason his son should not come to live in his home.</p> <p>Court Investigator Samantha Henson's Report filed on 4/9/12</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <ol style="list-style-type: none"> 1. Need <i>Notice of Hearing</i>. 2. Need proof of service of the <i>Notice of Hearing</i> along with a copy of the <i>Petition or Consent and Waiver of Notice or Declaration of Due Diligence</i> on: <ol style="list-style-type: none"> a. Catalina Barajas (Dassy's paternal grandmother) b. Jorge's paternal grandparents 	
Dassy age: 13 years DOB: 7/20/1998				
Ashley age: 4 years DOB: 6/2/2007				
Jorge age: 2 years DOB: 11/20/2009				
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			

Reviewed by: KT
Reviewed on: 4/6/12
Updates: 4/12/12
Recommendation:
File 20 – Gomez, Madrigal & Zaragoza